**2020 INFORMATION DATA SHEET for What a Refund, Inc.**

Please complete the questionnaire below providing us with your information to the best of your knowledge.

|  |  |
| --- | --- |
| **Taxpayer Name:** | **Spouse Name:** |
| **Social Security #:** | **Social Security #:** |
| **Date of Birth:** | **Date of Birth:** |
| **Occupation:** | **Occupation:** |

|  |  |
| --- | --- |
| **Current Home Address:**  **Residential** | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Email Address:** |  |

|  |  |
| --- | --- |
| **Home Phone:** |  |
| **Fax :** |  |

|  |  |
| --- | --- |
| **Taxpayer Cell:** |  |
| **Spouse Cell:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Dependents Name:** | **Social Security:** | **DOB (M.D.Y.)** | **Relationship: (son, Daughter etc.)** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Married filing jointly □ Married filing separately

Head of Household □ qualifying widower □ Divorce Date \_\_\_\_\_\_\_\_\_\_

**Do you**: □ Own □ Rent □ other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Do you have a:** □ Checking Account □ Savings Account □ Investment Account

**Did you change your Bank Account information? Yes** □ **No** □

**Name of Financial Institution: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Routing # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Account# \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Did you receive Forms 1099A, 1099-MISC, 1099C, 1099-S, 1095-A or B? Yes** □ **No** □

**Did you receive The Economic Payment, or Form 1099R, 1099G? Yes** □ **No** □

**Do you owe past due taxes to the IRS from prior returns?** ... Y**es** □ **No** □

**Did you Purchase/Sell/Re-Fi/Modify/Short Sale any property (HUD)?**  **Yes** □ **No** □

**Did you Sell Stocks during 2020**? ………..……………… **Yes** □ **No** □

**Did you OPEN or CLOSE a business (LLC, Corp, Inc.)?** **Yes** □ **No** □

**Did you receive or pay alimony during 2020?**  **Yes** □ **No** □

**Did anyone attend College or University or Technical School Form1098-T 2020? Yes** □ **No** □

**Yes, I (we) agree to all preparations fees to be taken from my gross refund? Yes** □ **No** □

**Taxpayer’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**